

Training Guide – Asset Management

Updating Locations and Custodians in Basic Add

State of Kansas

Applicable Role(s):

Agency Asset Processor

Agency Asset Maintainer

Created 2/1/2013

Updating Locations and Custodians in Basic Add Training Guide Statewide Management, Accounting and Reporting Tool

_			- 6	\frown		- 1 -
12	n	Ω	\triangle T	Co	nto	ntc
ıα	v	C	OI.	$\mathbf{C}\mathbf{U}$	וונכ	หมอ

Updating Locations and Custodians	n Basic Add 3
--	---------------

Page 2 of 4 Created 02/01/2013

Updating Locations and Custodians in Basic Add Training Guide

Statewide Management, Accounting and Reporting Tool

Updating Locations and Custodians in Basic Add

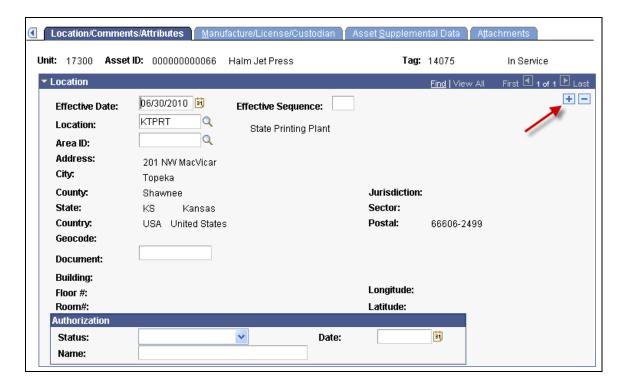
- SMART keeps an audit trail of past Location Codes and Custodians.
- To update a Location Code or Custodian, you must click the "+" button to add a new row. Then select the new Location Code or Custodian and Save. This allows you to keep track of where the asset was or who the custodian was at a specific time.
- New Location Codes can be created if you don't find the one you need. Log a Service Desk ticket with the Description, Address, City, County, State, and Postal Code.
- New Area Id's can be created if you don't find the one you need. See the "Adding and Inactivating Area Id's" job aid.
- In the event that a large number of assets need to be transferred from one custodian to another, log a Service Desk ticket including the Employee Name and Employee ID for both the old and new custodians. The same can be done for Location updates by providing the old and new Location Codes. Central can process a Mass Change to update all the assets with the new custodian and/or location. This should only be used for a large number of updates.
 - Example for Custodian: John Smart retired (K0000123456). Please transfer all assets to Liz Smart (K0000456789).
 - Example for Location: We are no longer housing assets at KT123. Please transfer them to KT456.
- If an employee retires or leaves an agency, nothing happens on the asset record until
 someone manually updates the Custodian. There is no "flag" in AM that the individual is
 no longer a valid custodian. Because the custodian field is maintained by the agency
 (not Central), there really is no formalized "acceptable timeframe" in which to make the
 change. But it is in the agency's best interest to keep the custodian field as up-to-date as
 possible.

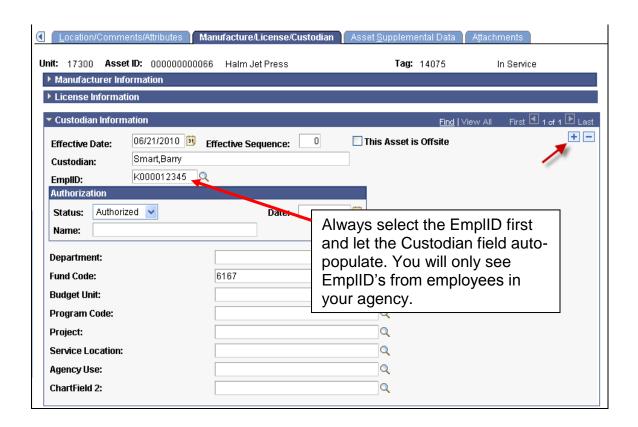
Update to:	Navigation
Location Code	Asset Management>Asset Transactions>Owned Assets>Basic Add>Location/Comments/Attributes tab
Custodian	Asset Management>Asset Transactions>Owned Assets>Basic Add> Manufacturer/License/Custodian tab

Created 02/01/2013 Page **3** of **4**

Updating Locations and Custodians in Basic Add Training Guide

Statewide Management, Accounting and Reporting Tool





Created 02/01/2013 Page **4** of **4**